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ABSTRACT

Evidence exists indicating that significant planning for elementary and secondary education has been largely absent. Recently educators have placed more emphasis on short-range and long-range planning as they have become more aware of the benefits of such planning to educational organizations. The areas receiving attention are the increasing size of educational institutions, the expansion of educational responsibilities, changing educational aspirations, increasing educational costs, the civil rights movement, and rapid technological change. Budgeting is the controlling segment of any planning system. This paper presents 13 principles that form a foundation for effective planning/budgeting systems. To ensure that those involved in planning are in agreement on the terms used, a terminology list with definitions of all terms listed is also provided. Included with the paper are two attachments--one on basic language use for decision making, the other a basic program-development model. (MD)

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PLANNING: ITS RELATIONSHIP TO FISCAL ALLOCATIONS IN BUDGETING FOR A SCHOOL DISTRICT

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ABSTRACT

Planning: Its Relationship To Fiscal Allocations
by
Dr. Lyle E. Boyles

Planning is an activity that means different things to different people. Obviously, there are various levels of this process ranging from individual, personal planning to corporate planning that involves many people utilizing very sophisticated approaches.

However, much evidence exists that indicates that significant planning in the field of elementary and secondary education has been largely absent. Only recently, have educators and non-educators alike become more aware of the many benefits that accrue within an educational organization when both short and long term planning occur. To this point Candoli[1], Hock, Ray, and Stoller have written:

> There is little in the literature or in field practice to suggest that any great effort has been expended in the orderly , systematic, coordinated creation of alternative plans for school districts to use as guidelines for future actions. This paucity in planning is best reflected in the manner in which many school systems have had to adopt "crash" programs to achieve certain goals and in the way accumulated pressures have led to several dislocations in educational programs.

To this same point, Martin Burlingame[2] has written:

> While individuals know what they are about in their specific roles, for example, classroom instructor, schools as organizations do not know what they are about.

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[1]Candoli, 1. Carl; Hock, Walter G.; John R.; and Stollar, Dewey, H. School-Business Administration; A Planning Approach, (Boston: Allyn and Bacon, Inc. 1973), p. 4.

[2]Bacharach, Sanuel B. (Ed.), Organizational Behavior In Schools and School Districts, (New York: Praeger Publishers 1981), p. 430.

Although there has always been benefits available from good planning, certain major forces have highlighted the planning needs of educational institutions in the past number of years. Some of them are:[3]

1. Increase size of educational institutions.
2. Expansions of educational systems responsibility.
3. Changing educational aspirations.
4. Increased costs of educational services.
5. Civil rights movement.
7. The technological and knowledge explosions.

Beyond the awareness of the need for planning, lies the fundamental challange of getting into appropriate planning provisions, techniques, models, and attitudes. In short, efforts to establish some type of planning system or to increase the effectiveness of planning in a school organization can be marked by a number of pitfalls.

Further, the transition from the actual planning to the translation of its results into dollar allocations is causing many school organizations some serious challanges. In spite of what one may think about fiscal resources, reality is that with money things can be done but without it implementation is impossible. this paper deals with the real issues of causing planning results to relate directly to fiscal allocations. It is a concise review of a planning/budgeting system that can be understood by all involved in an educational organization. For additional information in regard to the actual implementation of the system, contact Dr. Lyle E. Boyles, 45 Angelina Drive, Augusta, Kansas 67010.

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[3]Candoli, Op. Cit., pp. 5 & 6.

INTRODUCTION:

Planning is an activity that means different things to different people. Obviously, there are various levels of this process ranging from individual, personal planning to corporate planning that involves many people utilizing very sophisticated approaches.

However, much evidence exists that indicates that significant planning in the field of elementary and secondary education has been largely absent. Only recently, have educators and non-educators alike become more aware of the many benefits that accrue within an educational organization when both short and long term planning occur. To this point Candoli,[1] Hock, Ray, and Stoller have written:

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Beyond the awareness of the need for planning, lies the fundamental challange of getting into appropriate planning provisions, techniques, models, and attitudes. In short, efforts to establish some type of planning system or to increase the effectiveness of planning in a school organization can be marked by a number of pitfalls. Two examples of such pitfalls follow. First one must realize that many of the questions that should be asked by management change as planning becomes more visible. Hostrop[4] has written clearly to this point:

> In the final analysis, what distinguishes the manager from the non-manager is his <u>educational</u> contribution. The manager is uniquely expected to give others vision and to provide the climate for them to effectively perform their jobs.

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[3] Candoli, Op. Cit., pp. 5 & 6.

[4] Hostrop, Richard W., <u>Managing Education for Results,</u> (Homewood, Illinois: ETC Publications 1973). p.p. 171-172.

> The manager has a specific tool; information. He does not "handle" people, he motivates, guides, organizes others to do their own work be they sub-administrators, teachers, or students. The manager's effectiveness depends upon his ability to listen and to read, or his ability to speak and to write.
>
> Too often, however, managers make decisions on the wrong questions. Effective managers spend considerably more time on determining the right questions to ask than on finding the right answers which all too often are to the wrong questions. The right questions should usually pertain to recurring problems rather than responding to an immediate crisis which, more often than not, is rooted in fundamental questions that have not yet been clearly asked. Until the right questions are posed, crisis administration will endure rather than preventive management.

In other instances, many perceptions held by persons within and outside of the organization have to be changed or modified as planning becomes more defined. Of course, one of the outcomes of the involvement of people in planning activities centers around the desired changes in attitudes. Stephen P. Robbins[5] has given a concise description of personal perceptions as opposed to reality itself. He wrote:

> Individuals behave in a given way or form certain attitudes based not on the way their external environment actually is but rather on what they see or believe it to be. Because individuals act on their interpretations of reality rather than reality itself, it is clear that perception must be a critical determinant of our dependent variable.
>
> An organization may spend millions of dollars to create a pleasant work environment for its employees. However,

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[5]Robbins, Stephen P. Organizational Behavior; Concepts and Controversies, (New Jersey: Prentice-Hall, Inc. 1979), p. 100.

> in spite of these expenditures, if an employee believes her job is lousy, she will behave accordingly. It is her perception of a situation that becomes the basis on which she behaves. The employee who perceives her superior as a hurdle-reducer and an aide to help her do a better job and the employee who sees the supervisor as "big brother, closely monitoring every motion, to insure that I keep working will differ in their behavioral responses to their supervisor. The difference has nothing to do with the reality of the supervisor's role; the difference in behavior is due to different perceptions.

With some recognition to awareness given and the general nature of the challenge better understood, what are the main ingredients in a Planning-Budgeting System? After a number of years in dealing with this issue, I have come to believe that the budget (beyond simply dealing with revenues and expenditures) is essentially the control part of the system in implementing and sustaining the planning decisions that have been made. In spite of what one may think about fiscal resources, reality is the fact that with money things can be done but without money implementation is impossible. Therefore, the act of appropriating funds determines the activities that will be done during the time-frame contained within the appropriations act.

On the other hand, I have come to believe that planning, in the most fundamental sense, results in a series of complex written agreements (as to what will take place in the future) among those within and outside the organization that have a significant stake in the direction of the organization.

In addition to the two foregoing beliefs, results of research suggest there must be a set of principles concerning planning, some basic definitions, and a system which incorporates all of the above in order

to bring planning to an operational level within the organization. Following are some tried and proven principles along with related information that are visible in most effective planning/budgeting systems.

SOME PRINCIPLES CONCERNING PLANNING:

A. Appropriate, pre-determined procedures should be used in order to modify, delete, or add a program or a service.

   1. Places responsibility where effective justification or change can occur.

   2. Maintains sense of stability, on the long-term, within the organization.

   3. Encourages visable, vibrant, effective efforts through-out an organization.

   4. Relates goals to the "wherewithal" to implement.

   5. Minimizes complaints about unfunded areas.

B. Those within the organization that directly utilize an appropriated resource should share in decision-making about that which they use.

   1. Directs attention and work energy toward important issues.

   2. Faculty members and staff personnel (equipment, materials, support service).

   3. Unit administrators (priorities within each unit including personnel in addition to # 1).

C. Clarity should prevail within an organization as to the necessary scope of funding for all parts of the organization, not simply special interest parts.

   1. Highly promoted programs as opposed to necessary but more routine programs.

   2. "People" vs "Things" - an understanding.

D. An operational level "language" is vital to maintain understanding of program needs and funding levels.

E. An organization should have a means to realistically assess where it is in its level of operation.

F. Each program and/or administrative unit should have an equal opportunity to justify its needs. (Keep special interest in balance).

G. When uncontrollable events occur concerning resources that have a direct impact on programs, all should know the specifics and be required to modify accordingly.

H. An organization needs a capability to determine if it has been where it intended to be.

I. Planning encompasses the total system and its needs.

J. The diversity of skills needed to mount a planning function is a "team" effort and not a one-person show.

K. The planning role must be separated from the operational role so the resources are available to carry out the planning tasks.

L. There should be day-to-day operational interfaces with the planning data.

M. In the beginning phases of the implementation of a planning system, immediate problems should be dealt with on the way to short-term planning (approximately a 10 yr. period) and long-term planning (up to 20-25 yr. period).

SYSTEMS:

I. Purposes for any system:

1. Establish goals,
2. Develop programs reflecting goals,
3. Identify resources needed to implement programs,
4. Allocate physical and human resources, and
5. Evaluate in order to get continual plan development.

The circumstances within each organization will certainly have a significant effect on the type of system adopted. A decentralized system will, at time, produce an environment that is perceived to be too "loose" or unclear as opposed to a centralized system that is, at times, perceived to be too "rigid" or "inflexible".

I. Decentralized systems:

a) A well defined reallocation of certain decision-making power to management units in order to increase the quality and effectiveness of the total system.

II. Centralized systems:

a) Planning leader, financial planner, curriculum planner, facilities planner, and evaluation specialist.

TERMINOLOGY (Simple but meaningful to all):

1. Unit goals - A well developed school organization should be defined in terms of management units. For example, each school as well as each service unit (custodial, transportation, food service, etc.) comprise the components of a management system in a district. Therefore, "unit goals" consist of statements that point future direction within each management unit.

2. Unit priorities - Unit priorities consist of statements that are arranged in a sequence that produce an implementation of unit goals over a designated period of time.

3. Organizational goals - A composite of all of the unit goals.

4. Organizational priorities - A composite of all of the unit priorities.

5. Program development model - A set of policies and practices that commence with identification of specific program needs and moves through the work which produces a modified or revised program. These policies define role relationships and responsibilities for various individuals who participate in the generation of materials for program changes.

6. Written plans of instruction - An adopted set of written materials for each subject area offered in the school district. The materials center on the articulation of the division of skills and knowledge by grade equivelants from the beginning of the program through its ending.

7. Professional statement for curriculum - A set of non-policy beliefs developed and maintained by the faculty of each school in the district in regard to how the students are to be valued and what they are to be taught within the scope of the written plan of instruction for the district. Individual differences and needs are the focal point of professional deliberations.

8. Role relationships - It is vital in any planning system that the following three areas have defined and understood interfaces among them.

   a. Policy area - Primarily the area represented by school board policy formulation.

   b. Management area - The day to day operations of the schools as represented in the jurisdiction of the school superintendent, his/her staff, the school principal, and the service unit supervisors make up the management area.

   c. Program area - All of those experiences and course offerings provided for the education of the students.

9. Planning sheets - Forms that are organized according to the chart of accounts in the accounting system which carry the listing of all unit priorities. A fundamental document in the district's budget system.

10. Fund and chart of account structure - The heart of any defined system of accounting appropriate to schools.

11. Budget contingencies - Amounts of money which are carried in the budget for broad operational purposes but that are not specifically earmarked for a single purpose. these allow for properly budgeted funds that provide for needs which cannot be planned for over a years period of time. These funds should represent a very small portion of all the budgeted funds.

12. Funding levels - The act of policy makers (based on appropriate management recommendations) which appropriate specific dollar amounts to meet specific unit priorities.

13. Rate of implementation - The period of time necessary to implement all of the unit priorities listed on planning sheets.

14. Guide of study materials for implementation in the organization - The document which contains all of the planning data from each organizational unit. The basic ingredients in this document are: completed planning sheets, management recommendations, past history of funding levels, documented/projected revenues for the future.

    (Note: See attachments for examples and other key terms).

SUMMARY:

At this point, it should be understood that this approach to planning/

budgeting is based on a decentralized system. Again, it needs to be understood that the size and nature of each organization influences, to a great extent, the use of a centralized or a decentralized system. Much of this material can be adapted to either with some key modifications. The over-riding importance is that planning occur and fiscal allocations be consistent with that planning.

Regardless of the choice of system, we find the following advantages from the planning system.

1. Unnecessary work is primarily eliminated.
2. Costs that can occur in duplicated work, non-essential work, and work that results from a non-adopted goal is eliminated.
3. There is a significant increase in the return on time usage.
4. Decision-making in all areas is improved.
5. Services are improved.
6. Quality of work life for all employees is far better.

There exists an urgent need to intensify planning in most institutions of society. Currently, the public and legislative impressions are that some group (s) other than educators needs to intercede to get a desired level of quality. However, with more attention to the planning functions and greater effort in the three (3) following areas: much of the indecisiveness perceived in the field of education will change.

1. Some quality information is available in educational circles that does not seem to be reaching non-educational groups. (Goodlad's book, etc.).

2. Realistic costs for various programs need to be better understood and calculated. (Reading, math, science in public schools).

3. Better planning on a broader basis among educational organizations will reveal that old formulas for financing education need to be rigidly examined with an attitude of shifting from quantitative factors to qualitative factors.

ATTACHMENT A

Some basic language for use in
decision-making by policy-makers
during appropriations

INTRODUCTION

Educational planning and budget preparation are two of the most important parts of school operations. The following pages have been prepared for you as study materials for the final adoption of a 1984-85 General Fund budget. In addition, relevant material concerning some other Funds that receive transfers is included as marked.

You will find information that deals with the major operational segments of U.S.D. 402. Much of the material deals with fiscal request from Principals and Supervisors. These requests are noted on summary sheets consistent with the budget format. The adopted General Fund budget will produce fiscal committments for approximately 12 months, but may not provide for all of the items requested on the "planning sheets" since the planning ranges over a longer period of time. The non-funded items are "deferred" into another funding period. An item which is removed from a planning sheet by the appropriate principal or supervisor after discussion with Education Center personnel and/or the Board is said to be "red-lined". In this context, a "red-lined" item is one that does not relate close enough to the planning presented to warrant its procurement.

As the Board of Education establishes each level of funding for each area in this budget, we will work with each Principal and Supervisor in purchasing the items from their "planning sheets". These purchased items become, of course, their first priority items - the remaining ones are deferred for future consideration in other budget periods. A Principal or Supervisor may change a priority or two providing a significant factor(s) has changed since the initial planning was completed. (An example of a factor which can change from time of planning to time of implementation is the change of a teacher in a given classroom). The method of gaining approval for a change in priorities centers in a discussion with the Superintendent wherein the justification for the needed change is presented at the rate of implementation of planning in the various schools and service areas is determined by the amount of funds allocated in each budget period. However, a consistency in the scope and sequence of district-level planning continues from one funding period to another. Individual projects which are funded by the Board of Education during a budget period must come from "budgeted contingencies." Such "budgeted contingencies" are found in line items such as Board Expense (130, etc). <u>There are no unbudgeted monies or unlisted contingencies in this approach to budgeting</u>.

It should be understood that as projections of available dollar amounts change during the course of decision-making about an adopted General Fund budget for 1984-85, the appropriate, revised sheets will be given to you to up-date your study materials.

SUMMARY OF GENERAL FUND STRUCTURE

Following is a summary of the General Fund (Fund 11) structure. As you know, the State Department of Education is interested, primarily, in the total amount of expenditures in the General Fund as compared to the amount of budget authority for the year. The District budgets the total amount of dollars according to (1) General Purposes, (2) Building Levels and (3) Specific Line Items. These three factors (items 1,2, &3) go to make up the Chart of Accounts as seen on the following page.

GENERAL PURPOSES

There are a number of general purposes which are listed in the General Fund budget. Each of these purposes is given a specific series of numbers. The purpose with the greatest amount of money appropriated to it each year is Instruction which is the 200 series. As you will notice, most of the 200 series in the Chart of Accounts are expenditures which are made within the different schools.

There are other purposes in the General Fund for such services as Administration (100's), Health (400's), Custodial (600's), Maintenance (700's), Fixed Charges (800's), Student Activities (1000's), and Transfers to other funds (1400's). Most of these purposes are of a district-wide nature and, as such, are budgeted and charged to the district as a whole (Education Center,52). However, we will make certain charge backs to certain buildings in those areas where it might be necessary for us to determine what individual building costs have been for the year, e.g., utilities, etc.

BUILDING LEVELS

The following information allows the district to identify amounts of money budgeted for certain general purposes and specific line items on a school by school basis. The numbers shown on the right in Table I provide a translation from building name to a corresponding number that can be used in the account and computer systems.

TABLE I

Education Center	52
Garfield	54
Lincoln	56
Robinson	58
Junior High	60
Senior High	62

GENERAL OPERATIONS FUND -- Chart of Accounts

GENERAL PURPOSES	BUILDINGS
Administration	52
Specific Line Items 100 134	
Instruction	
211 216 254	52
220 253	54/56/58/60/62
HEalth Services	
411 452	52
Custodial Services	
* 610 660	52
*Except utilities 630,640, 641,642	54/56/58/60/62
Maintenance Services	
* 710 740	52
*Except 730 731	54/56/58/60/62
Fixed Charges	
811 851	52
Student Activity	
1020 1053	60/62
Capital Outlay	
1210 1403	52
Transfers, Etc.	
1402 1404	52

ATTACHMENT B

Basic program development model

DISTRICT WIDE STEERING COMMITTEE FOR CURRICULUM

The district-wide steering committee for curriculum is to be concerned with the nature of the educational program in the USD 402 Schools. The work of the committee should center around consideration of the articulation and co-ordination of the full sequence of subject matter and skills development in each area of study in grades K-12. The committee may recommend the commencing of district wide subject area committees.

The membership of the committee will consist of the Superintendent of Schools, all principals, board members, a counselor, the President of AEA, one teacher from each school and the P.T.O. Presidents or their designee along with a parent from each of the junior high and senior high. Memberships which are not established by position or office will be appointed by the President of the Board of Education in consideration of the recommendation of the Superintendent of Schools. In the initial year of implementation for this committee, the Superintendent of Schools will serve as chairman. Therafter, the chairman will be recommended by the Superintendent and approved by the Board of Education.

SUBJECT MATTER STUDY COMMITTEES IN CURRICULUM WORK

General Statement;

Curriculum work provides one of the most important means of improving the quality of the instructional program and adjusting it to the changing needs of students. Teachers are expected to participate in these activities at all levels, i.e., building and district wide. Teachers are expected to participate in the usual instructional and curriculum work activities within their buildings as a regular part of their responsibilities. This may include after school hours, as well as, time during the regular school day.

District-wide studies which include teachers from grades K-12, K-6, or 7-12 will be compensated at the rate of $6.25 per hour. Principals who are appointed to the study committee receive the same per hour rate.

For purposes of compensation, the chairperson (s) will establish the maximum number of clock hours for the study peior to the commencing of the study and in consultation with the principals who have teachers on the committee and the members of the committee. The maximum clock hours allocated by the chairperson will be made known before committee work commences on the study.

The expenditure of money for specific curriculum tasks including the study itself under this policy will be approved by the Board on the basis of proposals reviewed by the principals and recommended to the Board by the Superintendent of Schools.

Procedures for Study Committees:

1. Criteria for selection of academic area for curriculum study committee:

   A. Dependent upon felt need of principals, teachers students and parents.

   B. Dependent upon length of time when district curriculum work was last performed in this area.

   C. Dependent upon budget considerations.

   D. Dependent upon recommendation of District's Steering Committee for Curriculum.

2. Selection of chairperson or co-chairpersons for curriculum study.

   A. An administrator, usually a principal or assistant principal, is chosed by the principals to serve as chairman of the study. This individual usually volunteers his/her services and is then confirmed by the group. The principal's academic background and his/her elementary or secondary responsibilities are taken into consideration.

   B. A co-chairperson will be appointed from the teaching faculty in the academic area to be studied.

3. Selection of membership for curriculum committees:

   A. Principals of each building confirm the teachers from their building that will serve as members of the curriculum study committee. The principal will review such items as teacher's educational and experiential background, length of service in the district, level of communication skills used by the teacher, etc.

B. If the curriculum study is confined to secondary, (grades 7-12) only junior and senior high teachers are selected. If the study is limited to elementary (grades K-6) only elementary teachers will be selected. Studies that include both elementary and secondary levels and encompass grades K-12 will have teacher membership that represents all schools involved.

C. The number of teachers selected from each building depends upon the size of the faculty in each school. A total committee size is determined by the principals in cooperation with the Superintendent of Schools.

4. Responsibilities of Chairperson(s) for curriculum study committee:

A. To keep the Superintendent of Schools, informed concerning progress and direction of the committee.

B. To determine, in cooperation with the Superintendent of Schools the maximum amount of hours necessary to complete the study.

C. To set meeting times and places with members of the study committee.

D. To help select the appropriate outside consultation services, when such has been approved in the initial proposal submitted to the Board of Education.

E. To help determine secondary school parent memberships on the committees, which involve secondary subjects (grades 7-12). At least three or four parents will be involved on study committees. The President of designated member of each P.T.O. will be members of committees which involve elementary subjects (grades K-6).

F. To keep an accurate record of individual committee members attendance at all meetings and to report same to the Superintendent of Schools for payment upon completion of the study.

G. To recommend to the Superintendent of Schools and the Board of Education the study committee's work including a written plan of instruction including time lines and funding recommendations for implementation into the current program.

5. Responsibilities of curriculum committee members:

   A. To actively participate in curriculum development in the subject matter area under study in the committee.

   B. To attend all meetings and work in conjunction with the appropriate principal in reporting back to the building faculties upon the progress of the committee at appropriate times. Ideas and suggestions from teachers not on the committee should be sought by committee members whenever possible so as to create total faculty involvement in the committee study.

   C. To assist in the implementation of the curriculum revisions as adopted by the Board of Education in each committee member's school.

* A written plan of instruction should show a division of subject matter or skill development in grade sequence. In addition, it should list the basal text and supplementary materials that will be best suited for the teaching of the sequence contained in the written plan.

SUBJECT MATTER COORDINATOR -- GRADES K--12

A. Rational

   1. To eliminate unnecessary subject matter repetition,
   2. To promote greater subject area articulation in the schools.
   3. To improve the quality of teaching in the school, and
   4. To increase teacher cooperation within subject matter areas of the schools.

B. Consideration of a Coordinator for subject matter will be given after appropriate subject area studies have been completed.

C. Description of Duties

   1. Curriculum

      a. Help develop comprehensive, coordinated programs in grades K-12, and
      b. Help correlate teaching materials to written plans of instruction.

2. Personnel

   a. Cooperate with principals in holding orientation meetings for teachers new to the district to familiarize them with the appropriate subject matter area,
   b. Become aware of the total program by visiting in teachers' classes in the subject area,
   c. Plan visits to other classes for teachers in the subject area, and
   d. Meet with teachers in their subject matter areas periodically.

3. Textbooks and Supplemental Materials

   a. Serve as chairman of all textbook committees in the subject matter area, and
   b. Work with teachers in supplementary materials selection.

4. Audio Visual

   a. Recommend audio-visual equipment and supplemental materials needed to improve the curriculum, and
   b. Encourage appropriate use of audio-visuals in classes.

5. In-Service Training

   a. Assist in the evaluation of strenths and weaknesses in the program, and
   b. Propose and plan in-service programs to improve the subject area program.

6. Research

   a. Help plan and conduct research in the subject matter area to discover if the program is meeting the needs of students, and
   b. Help plan and conduct follow-up studies of students to determine whether the program has met their needs.

7. Other

   a. Perform other appropriate duties as assigned.

D. Employment

1. Selection of coordinators shall be achieved through recommendation of the principals and the Superintendent of Schools as submitted to the Board of Education for approval.

2. Subject matter coordinators will receive released hours from teaching in order to carry out their duties.